



# ***FHA Catalyst –*** **Single Family** **Default** **Monitoring** **System**

## **Mortgagee User** **Guide**

**V1**

**U.S. Department of Housing and Urban Development**

*September 2021*



## Solution Information

Solution	Information
Solution Name	<i>FHA Catalyst: Single Family Default Monitoring System</i>
Solution Acronym	<i>SFDMS</i>
Document Owner	<i>OCIO</i>
Primary Segment Sponsor	<i>OCIO</i>
Application Version/Release Number	<i>1.0/1.0</i>

## Document History

Version No.	Date	Author	Revision Description
1.0	September 2021	HUD Development Contractor	N/A



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## 1. Introduction

Welcome to the *FHA Catalyst*: Single Family Default Monitoring System. The *FHA Catalyst*: Single Family Default Monitoring System is a web-based secure medium supporting Electronic Data Interchange (EDI), portal User Interface (UI), and Application Programming Interface (API – API will be in a future release) delivery of default reporting to the Federal Housing Administration (FHA). As part of the Housing Information Technology (IT) Modernization effort, the *FHA Catalyst*: Single Family Default Monitoring System replaces FHA Connection’s Single Family Default Monitoring System, streamlining the process to report defaults for Mortgagees and FHA staff. The *FHA Catalyst*: Single Family Default Monitoring System (SFDMS) enables real-time case status updates and creates a modernized experience through automation.

### 1.1. *FHA Catalyst*: SFDMS Mortgagee Guide

This document has been developed to provide users with guidance how to use the *FHA Catalyst*: Single Family Default Monitoring System. Please refer to the Single-Family Housing Policy Handbook 4000.1 for in depth information on FHA policy, event definitions, reporting timeframes, data elements and post audit requirements.

For FHA policies and requirements for default reporting, please utilize:

- Handbook 4000.1, FHA Single Family Housing Policy Handbook

[https://www.hud.gov/program\\_offices/housing/sfh/handbook\\_4000-1](https://www.hud.gov/program_offices/housing/sfh/handbook_4000-1)

For questions about this Guide, please contact FHACatalyst@hud.gov or the FHA Resource Center at 1- 800-CALLFHA (1-800-225-5342). Persons with hearing or speech support needs may use TDD/TTY by calling 1-877-TDD-2HUD (877-833-2483).



## 1.2. Technical Notes

1. It is highly recommended to use the latest **Google Chrome** browser when using *FHA Catalyst*. Other browsers are not fully supported and may cause loss of functionality.
2. Session Timeout is set to 30 minutes.

## 2. Getting Started

To utilize SFDMS, the Mortgagee must register with Catalyst.

Mortgagees with questions who are currently preparing or planning to apply for FHA approval soon may contact the FHA Resource Center via email at [answers@hud.gov](mailto:answers@hud.gov) or telephone at (800) 225-5342. Mortgagees can also perform research through the FHA Resource Center's [Knowledge Base of FAQs](#).

### 2.1. Access Information

FHA Approved Mortgagees may request access for a new user by contacting the FHA Resource Center at [answers@hud.gov](mailto:answers@hud.gov). Users will receive an email from HUD containing a username and a password reset link.

### 2.2. Logging In

The Google Chrome browser is the preferred browser to access FHA Catalyst. Other browsers are not fully supported and may cause loss of functionality.

1. Navigate to <https://fha-gateway.force.com/hudpdeform>.
2. Enter your username and your new password, then click **Login**.

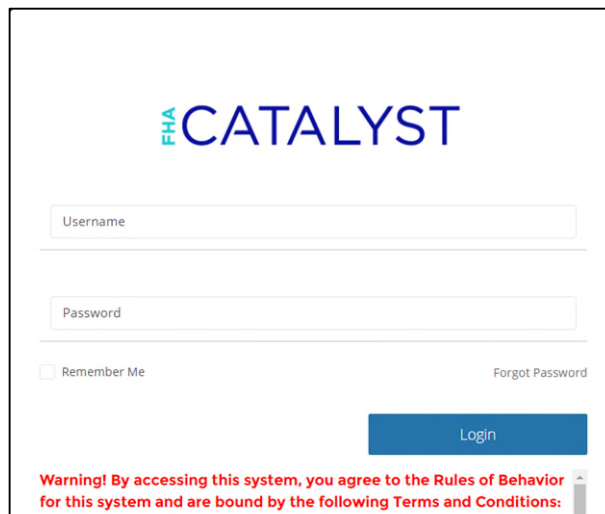
The screenshot shows the FHA Catalyst login interface. At the top, the text "FHA CATALYST" is displayed, with "FHA" in green and "CATALYST" in blue. Below this are two input fields: "Username" and "Password". Under the "Username" field is a horizontal line. Under the "Password" field is another horizontal line. To the left of the "Password" field is a checkbox labeled "Remember Me". To the right is a link labeled "Forgot Password". Below these elements is a blue "Login" button. At the bottom, a red warning message states: "Warning! By accessing this system, you agree to the Rules of Behavior for this system and are bound by the following Terms and Conditions:". A small upward arrow icon is to the right of the warning text.

Figure 1: FHA Catalyst Login Page



## 2.3. Resetting Your Password

1. If you do not remember your password, click **Forgot Password**.

Figure 2: FHA Catalyst Portal - Forgot Password

2. Enter your username on the Password Reset page then click **Reset Password**.

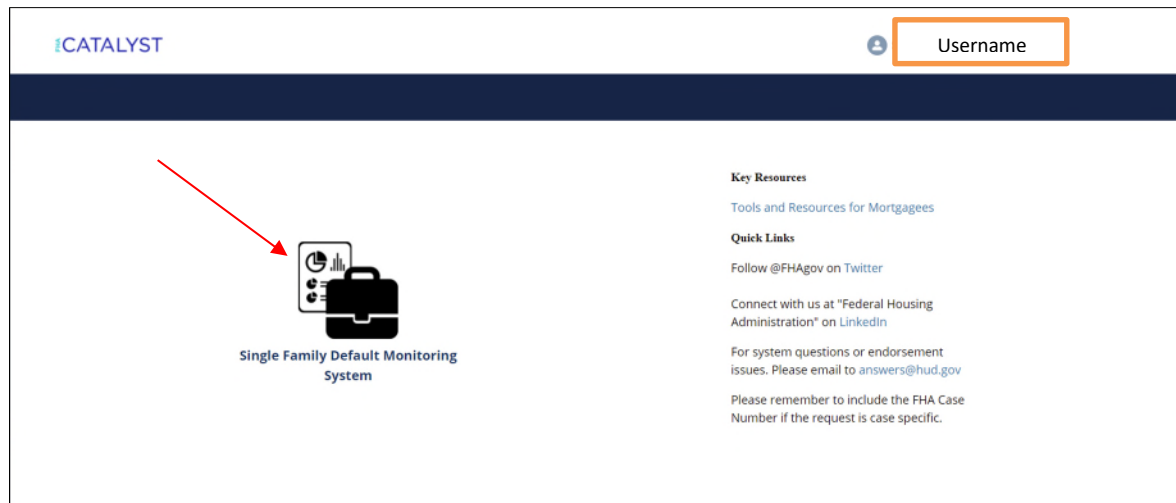
Figure 3: Reset Password

3. **Check your email.** Password reset instructions are sent to the email address associated with your username.

Figure 4: Reset Password Confirmation Message

### 3. *FHA Catalyst*: Single Family Default Monitoring System Home Page

**SFDMS** allows Mortgagees to report defaulted Single Family FHA-insured mortgages.

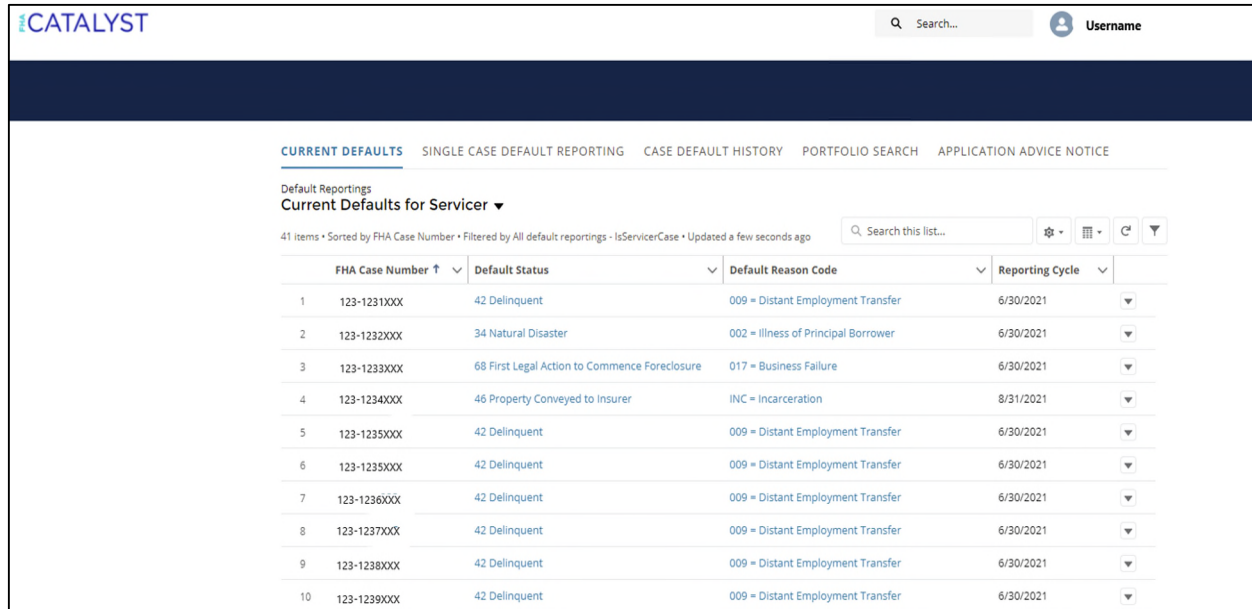


*Figure 5: SFDMS Home Page*

- Your **Username** is displayed at the top right of the screen. Click on your name to see the options to setup your **Profile**, **Settings**, **Account Information**, **Contact Support** and **Logout**.
- The home page provides access to helpful **Key Resources** and **Quick Links**. Click on the [Tools and Resources for Mortgagees](#) hyperlink to access the HUD.GOV Handbook References to the Single-Family Housing Policy Handbook and Supplemental Documents.
- **Click on the Single Family Default Monitoring System icon** in the middle of the page to launch the application.



## 4. Single Family Default Monitoring System



FHA Case Number ↑	Default Status	Default Reason Code	Reporting Cycle
1 123-1231XXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
2 123-1232XXX	34 Natural Disaster	002 = Illness of Principal Borrower	6/30/2021
3 123-1233XXX	68 First Legal Action to Commence Foreclosure	017 = Business Failure	6/30/2021
4 123-1234XXX	46 Property Conveyed to Insurer	INC = Incarceration	8/31/2021
5 123-1235XXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
6 123-1235XXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
7 123-1236XXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
8 123-1237XXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
9 123-1238XXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
10 123-1239XXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021

Figure 6: Current Defaults Screen

The *FHA Catalyst*: SFDMS provides a variety of options for reporting, reviewing, or cancelling and correcting the default reporting of delinquent FHA insured cases. Use the:

- **Current Defaults** screen to view a list of cases currently reported as delinquent for your portfolio. Make selections from the drop-down options to create views to see a list of cases to use in monitoring monthly default reporting. Click on the case number to view the last reported status of a loan.
- **Single Case Default Reporting** screen is used to manually report and to make corrections to reporting for the delinquent FHA insured loans in your portfolio.
- **Case Default History** screen is used to view the reporting history of a case. You can view the life of loan reporting history for a single case using this screen.
- **Portfolio Search** screen is used to create active default case queries. Users can create and view a report determined by their selections. The report can be downloaded and exported to excel as needed. Once selections are made and the Next button selected, a list of loans meeting the criteria will appear and is ready for downloading.
- **Application Advice Notice** screen is an online view of the monthly report TS824 detailing reported cases, errors and actions needed for the reporting cycle. This report can be downloaded and used to make corrections to errors and monitor your portfolio as needed.

## 4.1. Current Defaults Screen

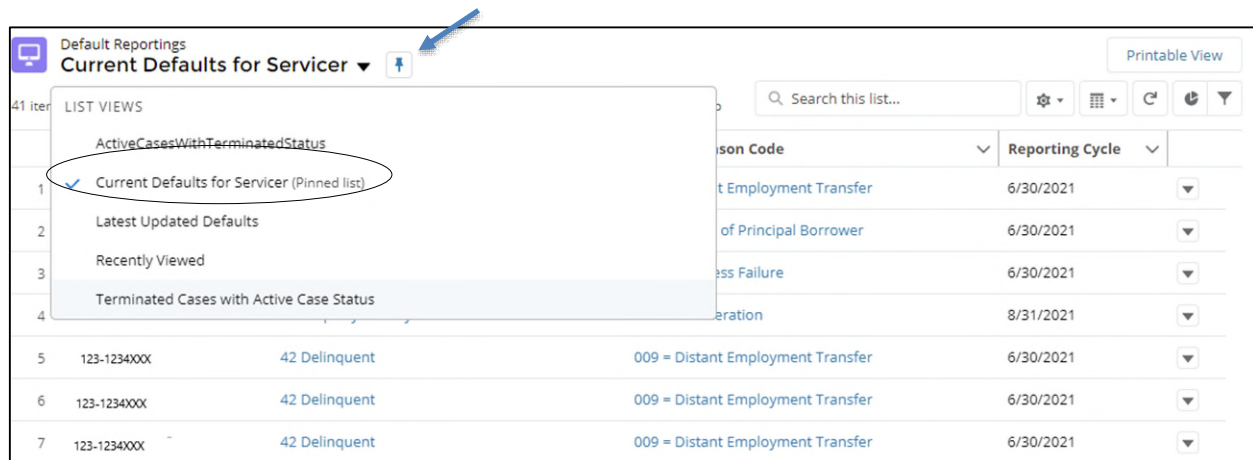


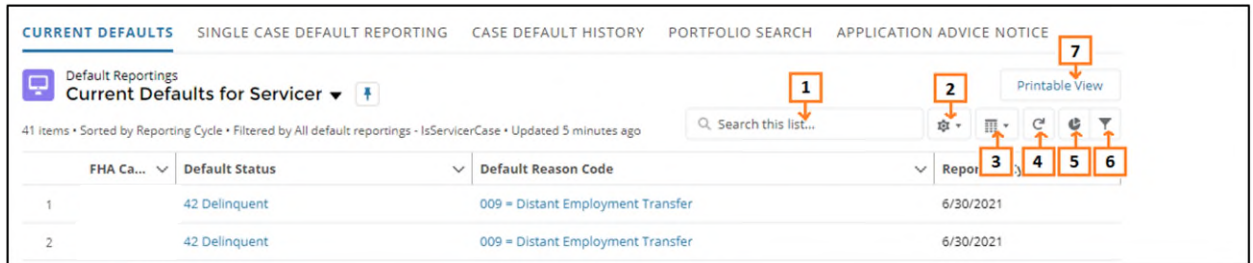
Figure 7: Current Defaults Screen - List View Options

Use the Current Defaults screen to create and view a list of cases currently reported as delinquent. Select one of the List View options to create a list of cases to review and monitor monthly default reporting codes. There are four predefined List View Options which can be filtered and sorted as needed. Quick access to view default information is allowed by selecting the case number. The case number link displays the last reported default reporting on the loan.

The List View selection options are:

- **Active Cases with Terminated Status** – This list displays active cases with a terminated default status code reported.
- **Current Defaults for Servicer** – A list of all current defaults reported from the Mortgagee.
- **Latest Updated Defaults** – A list of the cases updated in the last 24 hours.
- **Recently Viewed** – A list of loans recently viewed by the associate logged into the system.
- **Terminated Cases with Active Case Status** – This list displays terminated cases with an active default status code reported.

## 4.2.List View Filters



FHA Ca...	Default Status	Default Reason Code	Report
1	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
2	42 Delinquent	009 = Distant Employment Transfer	6/30/2021

Figure 8: List View Filters

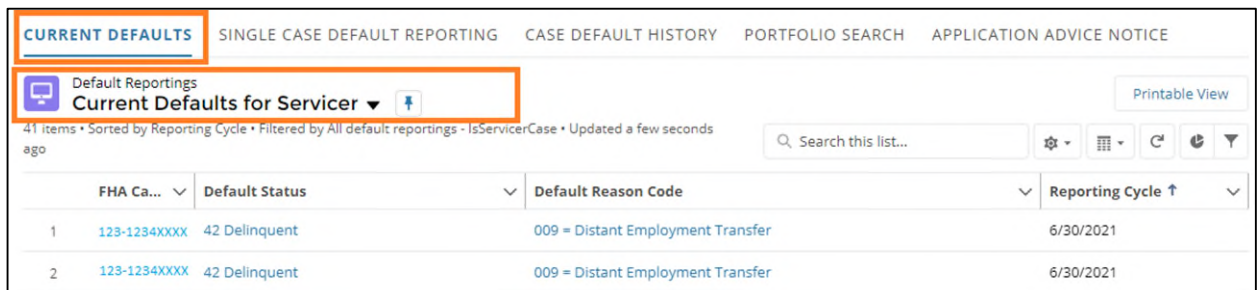
Above in Figure 8: List View Filters, you can control the list view layout. Note: Some control settings are only allowed by Administrators.

List View Filter Menu Bar:

1. **Search this list** – Use this field to search by Default Reason Code. Default status and Reporting Cycle filters can be used to sort the table.
2. **Tool (Cog) Icon** – Access list view controls to reset column width.
3. **Table Icon** – Allows the results to be displayed in a Table or Kanban view. We have disabled the Kanban view and the results will default to the Table view on this screen.
4. **Refresh Icon** – Refresh the list view.
5. **Chart Icon** – Used to transform list data into simple and easy-to-understand pictures, however, we have chosen to disable this feature on this screen.
6. **Filter icon** – Filter is locked and not accessed by general users. Use the sorting arrows to sort FHA Case Numbers.
7. **Printable View** – This button allows you to print the report being displayed on the screen.

### 4.3. Create a Portfolio List View

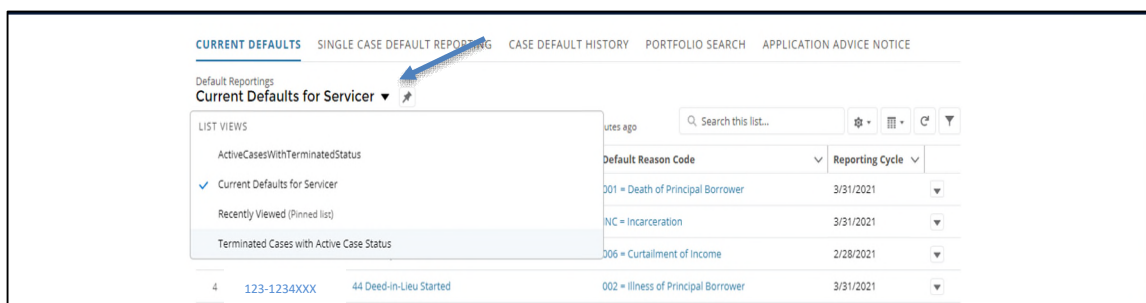
1. Click on the **Current Defaults** tab to access the screen.
  - The screen automatically defaults to the list view that has been pinned. In most cases it will be the **Current Defaults for Servicer** list view.
    - i. This view provides a list of current defaults reported for the Mortgagee.



	FHA Ca...	Default Status	Default Reason Code	Reporting Cycle
1	123-1234XXXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021
2	123-1234XXXX	42 Delinquent	009 = Distant Employment Transfer	6/30/2021

Figure 9: Current Defaults for Servicer List View

2. Change the list view by going to the drop-down arrow and selecting the view to display. The options for viewing are:
  - a. Active Cases with Terminated Status
  - b. Current Defaults for Servicer
  - c. Latest Updated Defaults
  - d. Recently Viewed
  - e. Terminated Cases with Active Case Status



	FHA Ca...	Default Status	Default Reason Code	Reporting Cycle
4	123-1234XXX	44 Deed-in-Lieu Started	002 = Illness of Principal Borrower	3/31/2021

3. The list view automatically populates the screen with cases matching the criteria for the view, if the portfolio has cases that meet the criteria.

**Note:** There may be instances when Mortgagees do not have active cases with terminated statuses or terminated cases with active statuses.



CURRENT DEFAULTS		SINGLE CASE DEFAULT REPORTING	CASE DEFAULT HISTORY	PORTFOLIO SEARCH	APPLICATION ADVICE NOTICE
Default Reportings Recently Viewed					
3 items • Updated a few seconds ago					
Search this list...					
FHA Case Number					
1	123-1234XXXX				
2	123-1234XXXX				

Figure 10: Current Defaults - Recently Viewed List View

4. Click on the **FHA Case Number** to view the last default reported status on the loan.

CURRENT DEFAULTS		SINGLE CASE DEFAULT REPORTING	CASE DEFAULT HISTORY	PORTFOLIO SEARCH	APPLICATION ADVICE NOTICE
Default Reportings Recently Viewed					
3 items • Updated a few seconds ago					
Search this list...					
FHA Case Number					
1	123-1234XXXX				
2	123-1234XXXX				

5. After case number is selected, the **Default Reporting** panel displays the last reported case information. Review the **Reporting Cycle Date** to determine the cycle date the status was reported. Click on any [field in blue](#) to access a [hyperlink](#) to a **guidance panel**.

Default Reporting  
123-1234XXX

Default Status  
46 Property Conveyed to Insurer

Default Reason Code  
INC = Incarceration

Reporting Cycle  
8/31/2021

▼ FHA Case Information

FHA Case Number  
123-1234XXX

Case Status Full Name  
Active

Mortgage Loan Number  
1234567XX

Servicing Account  
Home Point Financial

Mortgage Lender

▼ Default Information

Oldest Unpaid Installment  
6/1/2021

Unpaid Principal Balance  
\$501,000.00

Occupancy Status  
3 = Known to be Vacant

Occupancy Status Date  
8/11/2021

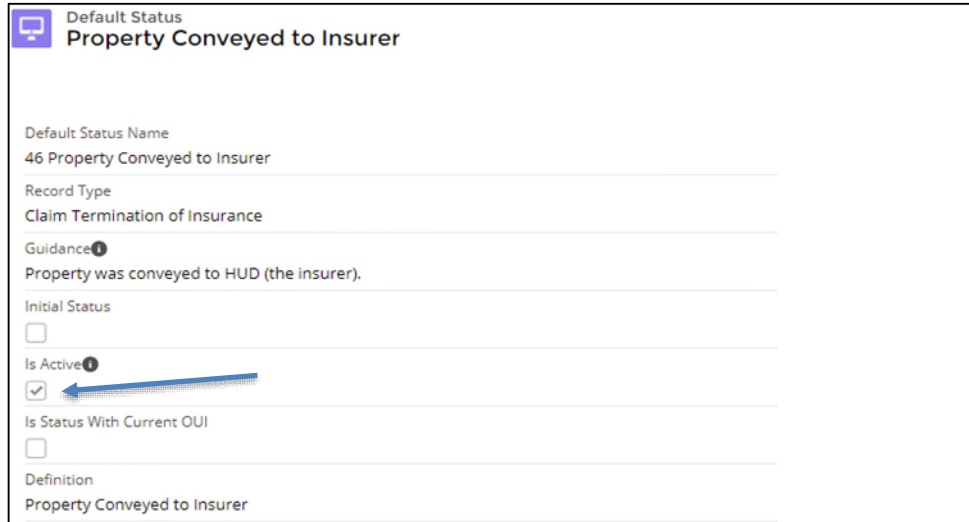
Default Status  
46 Property Conveyed to Insurer

Default Status Date  
8/10/2021

Default Reason Code  
INC = Incarceration

Reporting Cycle  
8/31/2021

Figure 11: Default Reporting Panel



**Default Status**  
**Property Conveyed to Insurer**

Default Status Name  
46 Property Conveyed to Insurer

Record Type  
Claim Termination of Insurance

Guidance ⓘ  
Property was conveyed to HUD (the insurer).

Initial Status  
☐

Is Active ⓘ  
☒


Is Status With Current OUI  
☐

Definition  
Property Conveyed to Insurer

Figure 12: Guidance Panel

The guidance panel:

- Provides the field name and a field description for the selection.
- A checkmark in the '**Initial Status**', '**Is Active**' or in the '**Is Status with Current OUI**' provides additional information to the user.
- The "i-icon" provides field level guidance for the field. Move the mouse to hover over the "i" to view a guidance popup panel for the field.



**Default Status**  
**Natural Disaster**

Default Status Name  
34 Natural Disaster

Record Type  
General Account Delinquency

Guidance ⓘ  
declared disaster area (as defined by FEMA).

Is Active ⓘ  
☒

Is Status With Current OUI  
☐

Determine if the Default Status is active and is viewable on the UI.

- Click the **left browser arrow** to exit the Guidance panel to return to the Default Reporting Panel.

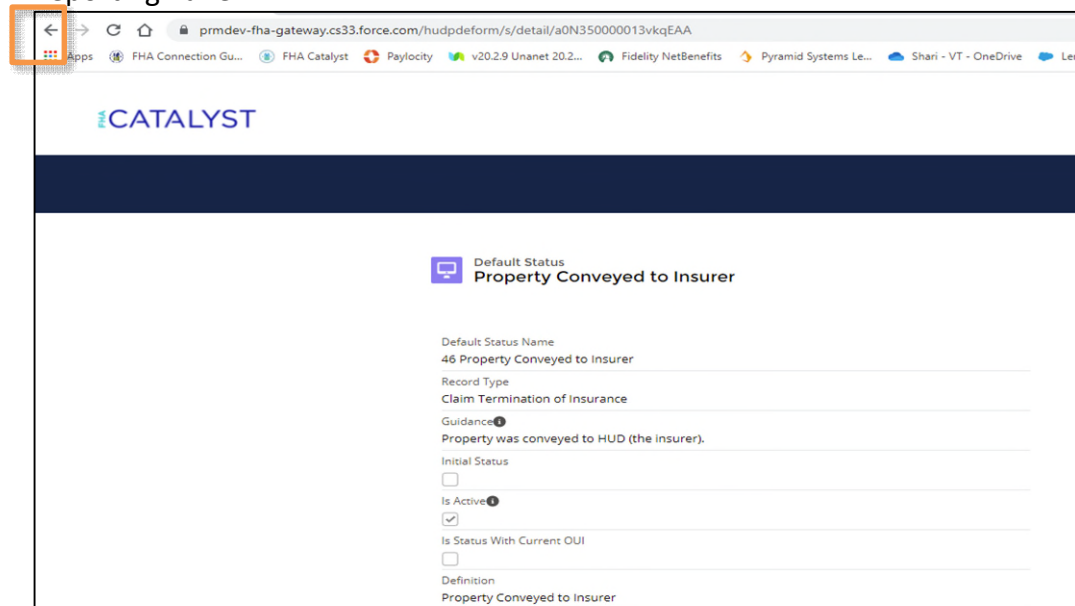


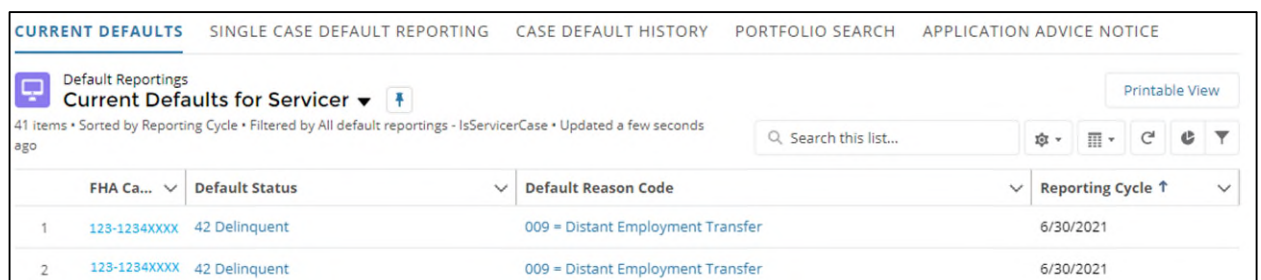
Figure 13: Top left arrow to return to Current Status screen

- Click on the **Return to Current Defaults** link to exit the Default Reporting Panel, to go back to the List View.



Figure 14: Return to Current Defaults button

- The system displays the **List View** previously selected.





## 5. Single Case Default Reporting Screen

The Single Case Default Reporting screen is used to manually report, view/validate, and update default reporting for delinquent FHA insured mortgages.



Figure 15: Single Case Default Reporting Home Screen

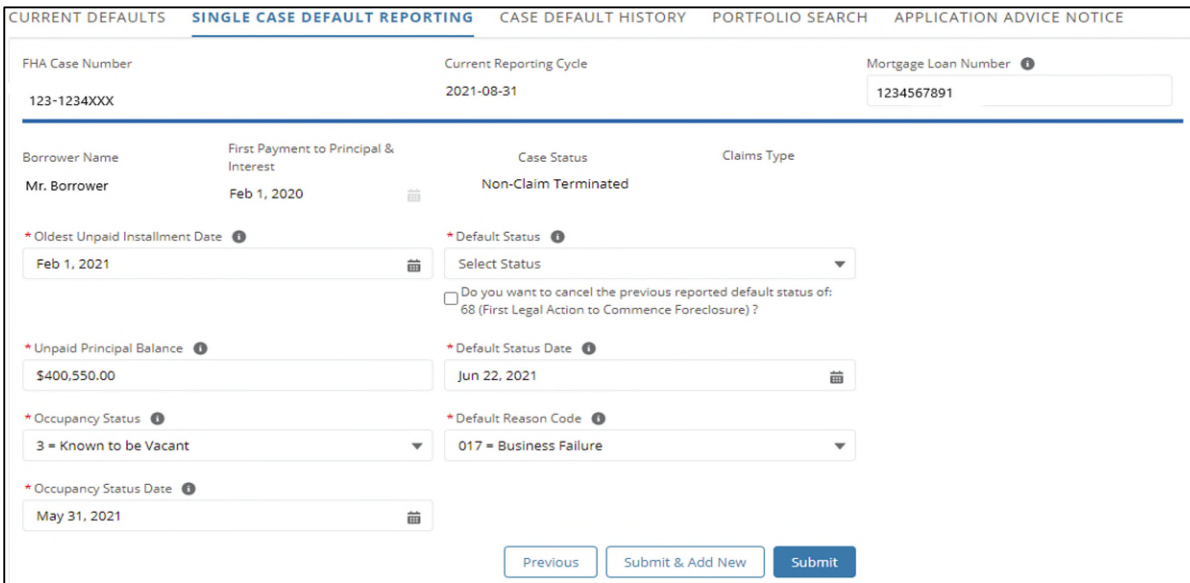


Figure 16: Single Case Default Reporting Screen

Input the case number and click the Next button to access the default reporting screen. The screen displays the case number, loan number and prior default reporting information for the case, if the case has previously been reported as delinquent. If the case is a new delinquency, you can submit reporting by making selections from the drop downs beneath each field name on the screen.

Use the i-icons next to the field name to aid in completion of the fields. Fields with a **red asterisk\*** are “required” fields and must be completed for successful default reporting. A successful reporting displays a green message at the bottom of the screen, stating the reporting was successfully completed, however, an error message will display if fields have not been updated correctly or if required fields have not been completed.



## 5.1. Report a Default Status on a New Delinquency

To report a default status on a newly delinquent loan:

1. Click on the **Single Case Default Reporting** screen. Input the **FHA Case Number** and click **Next**.

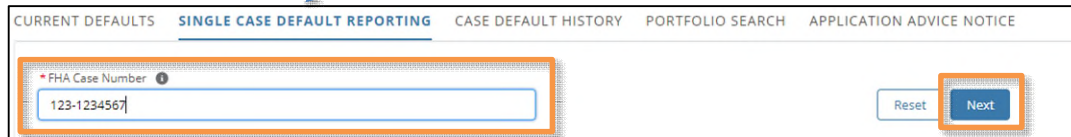


Figure 17: Single Case Default Reporting Home Screen

2. The default reporting panel appears. The **Default Status** field automatically defaults to default status code **42 Delinquent**. This field is grayed out and cannot be changed, because this code must be reported as the initial delinquency code.
  - a. The **Submit** button is also grayed out until all required fields have been updated. The required fields are fields with the **red asterisk (\*)**.

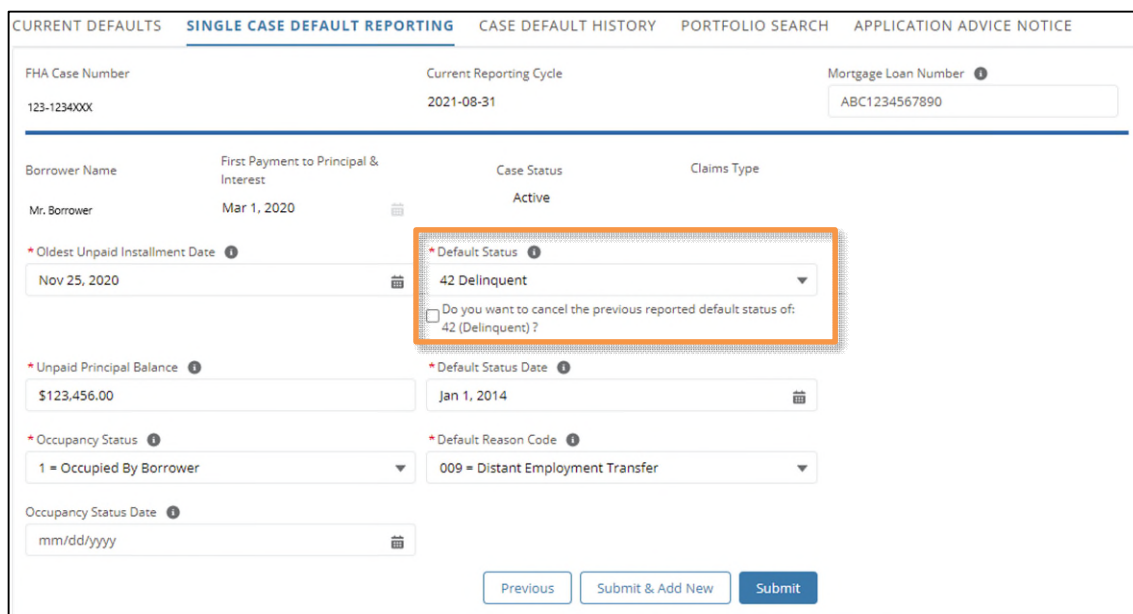


Figure 18: Single Case Default Reporting Screen

3. Go to the **Oldest Unpaid Installment Date** field. Use the calendar drop down to select a date or input a date into the field.



CURRENT DEFAULTS SINGLE CASE DEFAULT REPORTING CASE DEFAULT HISTORY PORTFOLIO SEARCH APPLICATION ADVICE NOTICE

FHA Case Number: 123-1234XXX Current Reporting Cycle: 2021-08-31 Mortgage Loan Number: ABC1234567890

Borrower Name: Mr. Borrower First Payment to Principal & Interest: Mar 1, 2020 Case Status: Active Claims Type:

\* Oldest Unpaid Installment Date: Jun 1, 2021 \* Default Status: 42 Delinquent

Do you want to cancel the previous reported default status of: 42 (Delinquent)?

\* Unpaid Principal Balance: \$123,456.00 \* Default Status Date: Aug 16, 2021

\* Occupancy Status: 1 = Occupied By Borrower \* Default Reason Code: 009 = Distant Employment Transfer

Occupancy Status Date: Aug 16, 2021

Previous Submit & Add New Submit

4. Go to the **Unpaid Principal Balance** field. The field defaults to \$123456.00. Begin typing in a value to clear the dollar amount.

\* Unpaid Principal Balance

\$500,000.00

5. Tab to the **Occupancy Status** field. Click on the right arrow to access the dropdown list. Select from the list.

\* Occupancy Status

3 = Known to be Vacant

6. Tab to the **Occupancy Status Date** field. This field becomes a required field if the occupancy status is **3 = Known to be Vacant**. Input the date or use the calendar to select a date to enter. It is not a required field if one of the other options is chosen.

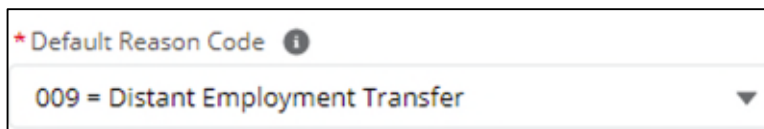
\* Occupancy Status Date

Apr 1, 2021

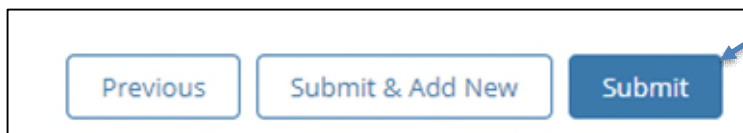
7. Tab to the **Default Status Date** field. Input the date or use the calendar to select a date to enter.



8. Go to the Default Reason Code field and select the Default Reason Code.



Once all required fields have been completed, the **Submit** button will turn blue and available to submit the default reporting.



9. Click the blue **Submit** button. The system updates the reporting history, and you should see a green **“Success! Case Report Successful”** message at the bottom of the screen.

**Note:** If a red error message appears on the screen, **after** you click Submit; review the message and review your selections on the screen. Make sure all required fields have been completed.

10. To report a status on another case, **click on the X** in the green message panel and the system will take you back to the Single Case Default Reporting Home Screen.






## 5.2. Report a Default Status on Prior Reported Delinquencies

1. Click on the **Single Case Default Reporting** screen. **Input the FHA Case Number** and click **Next**.

The screenshot shows the 'SINGLE CASE DEFAULT REPORTING' tab selected. Below the tabs, there is a red asterisk next to 'FHA Case Number' followed by an information icon. The input field contains '123-4567890'. Below the field, it says 'Complete this field.' To the right, there are 'Reset' and 'Next' buttons. A blue arrow points to the 'Next' button.

2. The last reported default status displays on the screen. (The occupancy, occupancy date, OUI, UPB, Default Status Code and Default Reason Code defaults to the screen).
- Update all the required fields for monthly reporting (red \*asterisk) if the information has changed since the previous reporting.

The screenshot shows the 'SINGLE CASE DEFAULT REPORTING' tab selected. The form displays the following information:

FHA Case Number		Current Reporting Cycle	Mortgage Loan Number
123-1234XXXX		2021-06-30	1234567XX

Borrower Name	First Payment to Principal & Interest	Case Status	Claims Type
Last Name, First Name	Mar 1, 2020	Active	33 - HAMP Partial Claim

* Oldest Unpaid Installment Date	* Default Status
Feb 1, 2021	11 Promise to Pay
<input type="checkbox"/> Do you want to cancel the previous reported default status of: 11 (Promise to Pay)?	
* Unpaid Principal Balance	* Default Status Date
\$450,000.00	Apr 29, 2021
* Occupancy Status	* Default Reason Code
1 = Occupied By Borrower	007 = Excessive Obligations - Same Income Including Ha
Occupancy Status Date	
Mar 29, 2021	

At the bottom, there are three buttons: 'Previous', 'Submit & Add New', and 'Submit'.



3. For this example, the **Occupancy Status Date** and a **new Default Status Code** and **Default Status Date** were selected and updated.
- A green **SUCCESS! Case Report Successful** message appears at the bottom of the screen.

CURRENT DEFAULTS		SINGLE CASE DEFAULT REPORTING		CASE DEFAULT HISTORY	PORTFOLIO SEARCH	APPLICATION ADVICE NOTICE
FHA Case Number <b>123-1234XXXX</b>		Mortgage Loan Number <b>1234567XX</b>				
Borrower Name Last Name, First Name		First Payment to Principal & Interest Mar 1, 2020	Case Status Active	Claims Type 33 - HAMP Partial Claim		
Oldest Unpaid Installment Date Feb 1, 2021		Default Status 06 Formal Forbearance Plan				
Unpaid Principal Balance \$450,000.00		Default Status Date Jun 1, 2021				
Occupancy Status 1 = Occupied By Borrower		Default Reason Code 007 = Excessive Obligations - Same Income Including Habitual Nonpayment of Debts				
Occupancy Status Date Jun 7, 2021						
<div>✓ <b>SUCCESS!</b> Case Report Successful</div>						



### 5.3. Report Multiple Default Status Codes - Single Case Default Reporting

1. Click on the Single Case Default Reporting home screen. **Input the FHA Case Number** and **click Next**.

CURRENT DEFAULTS **SINGLE CASE DEFAULT REPORTING** CASE DEFAULT HISTORY PORTFOLIO SEARCH APPLICATION ADVICE NOTICE

\* FHA Case Number ⓘ  
123-4567890  
Complete this field.

Reset Next

2. The last reported status displays on the screen. (The occupancy, occupancy date, OUI, UPB, Default Status Code and Default Reason Code defaults to the screen).
  - a. Update all required fields for the monthly reporting (red \*asterisk fields) as needed.

CURRENT DEFAULTS **SINGLE CASE DEFAULT REPORTING** CASE DEFAULT HISTORY PORTFOLIO SEARCH APPLICATION ADVICE NOTICE

FHA Case Number: 123-1234XXX Current Reporting Cycle: 2021-08-31 Mortgage Loan Number ⓘ: 1231234567

Borrower Name: Mr. Borrower First Payment to Principal & Interest: Mar 1, 2020 Case Status: Active Claims Type:

\* Oldest Unpaid Installment Date ⓘ: May 1, 2021 \* Default Status ⓘ: 09 Special Forbearance  
☐ Do you want to cancel the previous reported default status of: 09 (Special Forbearance)?

\* Unpaid Principal Balance ⓘ: \$400,000.00 \* Default Status Date ⓘ: Jun 8, 2021

\* Occupancy Status ⓘ: 1 = Occupied By Borrower \* Default Reason Code ⓘ: 031 = Unable to Contact Borrower

Occupancy Status Date ⓘ: May 15, 2021

Previous Submit & Add New Submit



- Click on the **Submit & Add New** button.

Current Defaults SINGLE CASE DEFAULT REPORTING CASE DEFAULT HISTORY PORTFOLIO SEARCH APPLICATION ADVISE NOTICE

FHA Case Number: 123-1234XXX Current Reporting Cycle: 2021-08-31 Mortgage Loan Number: 1231234567

Borrower Name: Mr. Borrower First Payment to Principal & Interest: Mar 1, 2020 Case Status: Active Claims Type:

\* Oldest Unpaid Installment Date: May 1, 2021 \* Default Status: 34 Natural Disaster

\* Unpaid Principal Balance: \$400,000.00 \* Default Status Date: Aug 16, 2021

\* Occupancy Status: 1 = Occupied By Borrower \* Default Reason Code: 017 = Business Failure

Occupancy Status Date: Aug 2, 2021

Buttons: Previous Submit & Add New Submit

- The screen accepts the new reporting status and message display at the bottom of the screen stating, **"The previous default reporting was saved successfully!"**

The module is ready to accept another default reporting status. Update the Default Status code and Default Status Date, if needed. Click Submit & Add New. Continue, until all codes and dates have been reported successfully for the reporting cycle.



## 5.4.Cancel the Last Reported Default Status

When a Mortgagee discovers a previous status code was reported in error, the Mortgagee must:

- Report a **Default Status Code 25 (Cancel)**, to advise HUD that the last status code reported was in error and should be preserved as a historical record without influencing the default sequence; and
- Report the correct Status Code; use the **Single Case Default Reporting** screen to make the correction.

1. Go to the **Single Case Default Reporting** screen. Enter the case number and click the **Next** button.

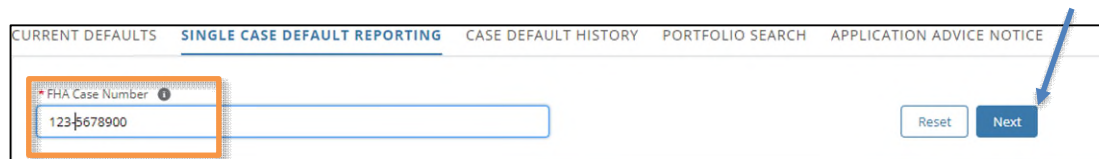


Figure 19: Single Case Default Reporting

2. The Single Case Default Reporting screen appears with the last reported code for the case. To cancel the previous reported default status code; **click the box** beneath the **Default Status** drop down list, to confirm cancellation of the previous code.

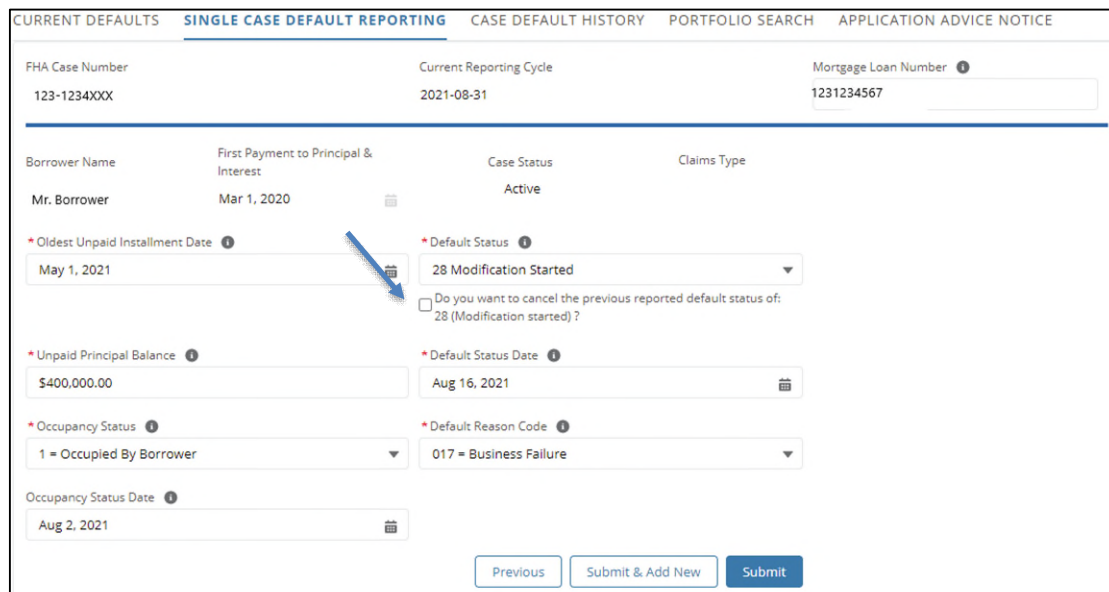
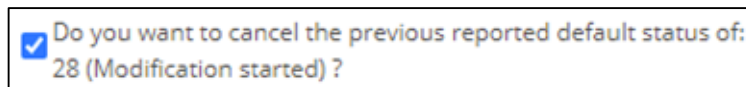



Figure 20: Example of Cancel Previous Status Message



3. A blue checkmark appears in the box and the *current Default Status* is removed. This action adds the **Default Status Code 25 (Cancel)** to the default reporting history and allows you to make a new default status code selection from the list.

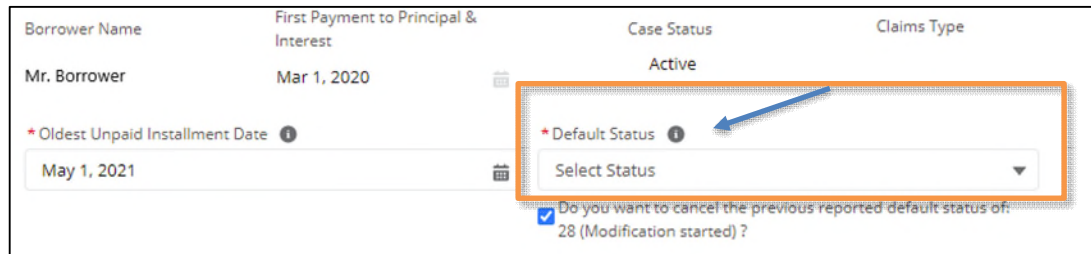
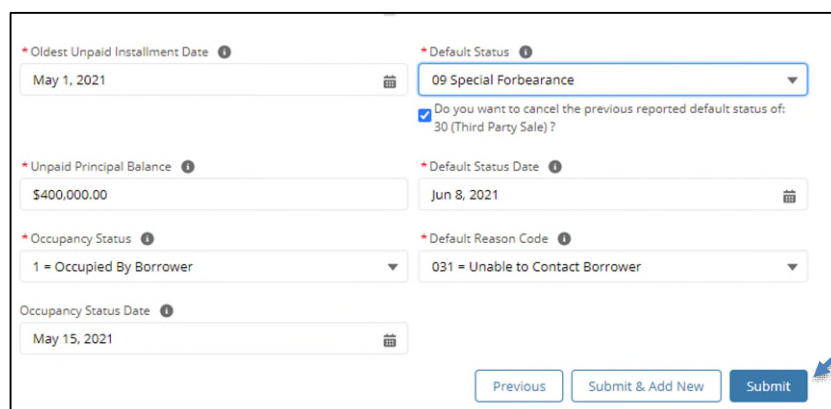


Figure 21: Cancel and Add New Status Code

- a. Make a new selection from the **Default Status** list and **Click Submit**.



4. A popup panel displays, asking if you are sure you want to cancel the status code XX. **Click OK**.

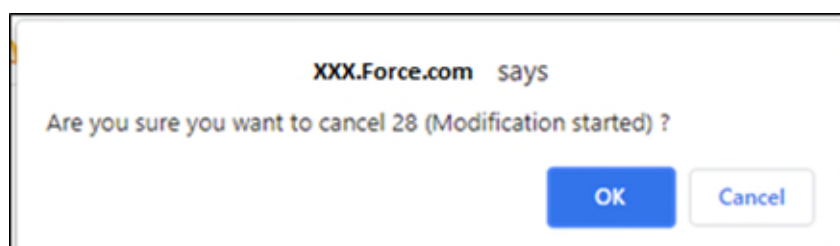


Figure 22: Default Code Cancellation Confirmation



5. The module adds the Status Code 25 and the new default status code to the case and history. A **SUCCESS! Case Report Successful** message appears on screen.

CURRENT DEFAULTS **SINGLE CASE DEFAULT REPORTING** CASE DEFAULT HISTORY PORTFOLIO SEARCH APPLICATION ADVICE NOTICE

---

FHA Case Number: 123-12134XXX Mortgage Loan Number: 1231234567

---


Borrower Name	First Payment to Principal & Interest	Case Status	Claims Type
Mr Borrower	Mar 1, 2020	Active	

---

Oldest Unpaid Installment Date	May 1, 2021	Default Status	12 Repayment/Informal Forbearance Plan
		The following code has been cancelled: 28 (Modification Started).	

---

Unpaid Principal Balance	\$400,000.00	Default Status Date	Aug 16, 2021
Occupancy Status	1 = Occupied By Borrower	Default Reason Code	017 = Business Failure
Occupancy Status Date	Aug 2, 2021		



**SUCCESS!**  
Case Report Successful

## 6. Case Default History Screen

Use the **Case Default History** screen to view a history of default reporting for a case. This is a paging screen and provides the case life default reporting detail, including the corrections and cancellations, made to the reporting. Use the scroll bar to scroll right to see other columns of data on the screen or export and download to excel for easy auditing and analysis. Simply click on the Download as CSV button to export the information to a spreadsheet.

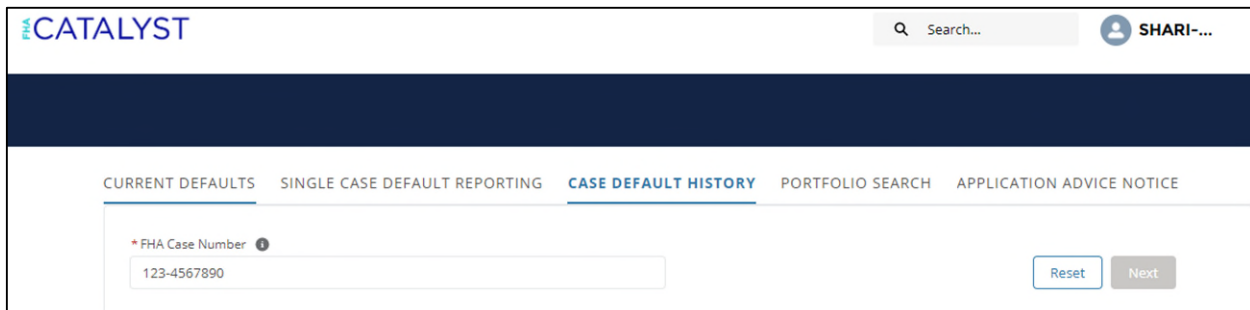


Figure 23: Case Default History Home Screen

FHA Case Number

123-123XXXX

Mortgage Loan Number

123456789

Borrower Name

Last Name, First Name

Download as CSV

Finish

Search this list...

SHOW 10 ENTRIES

Sequence ...	Servicer ID	Transaction...	Transaction...	Reporting ...	Oldest Unpaid Date	Month Delinq...	Default Status ...	Default Stati
4	123XX	S	August 16, 2...	August 31, 2...	May 01, 2021	3	34 (Natural Disaster)	August 16, 2
5	123XX	S	August 16, 2...	August 31, 2...	May 01, 2021	3	28 (Modification started)	August 16, 2
6	123XX	S	August 16, 2...	August 31, 2...	May 01, 2021	3	12 (Repayment/Informal Forbearance Plan)	August 16, 2
7	123XX	S	August 16, 2...	August 31, 2...	May 01, 2021	3	28 (Modification started)	August 16, 2
8	123XX	S	August 16, 2...	August 31, 2...	May 01, 2021	3	25 (Cancel)	August 16, 2
9	123XX	S	August 16, 2...	August 31, 2...	May 01, 2021	3	12 (Repayment/Informal Forbearance Plan)	August 16, 2

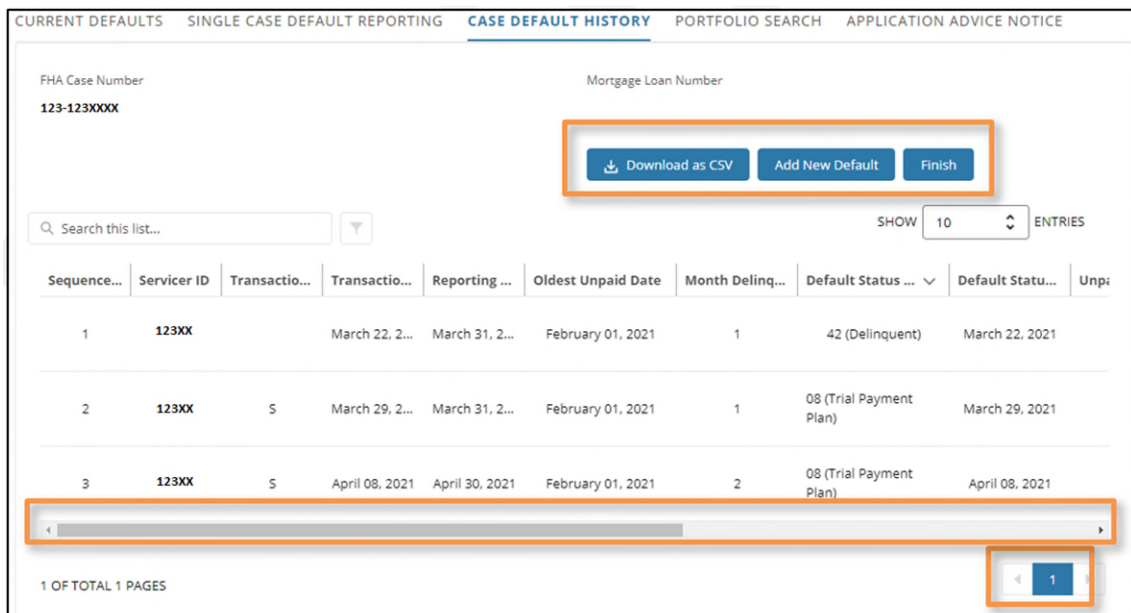
Figure 24: Case Default History Results Screen

## 6.1. Review Case Default History Status

1. Click on the **Case Default History** screen and **input the case number** to view the case history of a loan in default. Click on the **Next** button.



2. The life of loan history of default reporting for the case displays online. Use the bottom **scroll bar** to view columns of data and use the paging arrows to view other pages of default reporting history.
  - Click the **Download to CSV** to download a report to excel.
  - Click on the **Add New Default** to add a new default reporting status to the case.
  - Click **Finish** when you have completed your task on the screen.



Sequence...	Servicer ID	Transactio...	Transactio...	Reporting ...	Oldest Unpaid Date	Month Delinq...	Default Status ...	Default Statu...	Unpi
1	123XX		March 22, 2...	March 31, 2...	February 01, 2021	1	42 (Delinquent)	March 22, 2021	
2	123XX	S	March 29, 2...	March 31, 2...	February 01, 2021	1	08 (Trial Payment Plan)	March 29, 2021	
3	123XX	S	April 08, 2021	April 30, 2021	February 01, 2021	2	08 (Trial Payment Plan)	April 08, 2021	



## 6.2. Add a New Default Status from Case Default History Screen

SFDMS provides two options to add default reporting statuses to FHA cases. You can use the **Single Case Default Reporting** screen, or you can use the **Case Default History** screen to select an FHA Case Number to quickly “Add New Default” status to a case. Below are the procedures to learn how to report a default status using the **Case Default History** screen.

1. Go to the **Case Default History** screen. Input the **FHA Case Number** and click the **Next** button.


The screenshot shows the 'CASE DEFAULT HISTORY' tab selected. Below the tabs, there is a label 'FHA Case Number' with a red asterisk and an information icon. A text input field contains the value '123-4567890'. To the right of the input field are two buttons: 'Reset' and 'Next'. The 'Next' button is highlighted with an orange rectangle.

2. The life of loan default reporting displays on the screen.

The screenshot shows the 'CASE DEFAULT HISTORY' tab selected. Below the tabs, there are two input fields: 'FHA Case Number' with the value '123-123XXXX' and 'Mortgage Loan Number' with the value '1234657XX'. Below these fields are three buttons: 'Download as CSV', 'Add New Default', and 'Finish'. Below the buttons is a search bar with the placeholder text 'Search this list...' and a dropdown menu with the value '10'. Below the search bar is a table with the following columns: Sequence..., Servicer ID, Transaction..., Transaction..., Reporting..., Oldest Unpaid Date, Month Delinq..., Default Status..., and Default Status. The table contains six rows of data.

Sequence...	Servicer ID	Transactio...	Transactio...	Reporting ...	Oldest Unpaid Date	Month Delinq...	Default Status ...	Default Statu
4	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	34 (Natural Disaster)	August 16, 20...
5	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	28 (Modification started)	August 16, 20...
6	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	12 (Repayment/Informal Forbearance Plan)	August 16, 20...
7	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	28 (Modification started)	August 16, 20...
8	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	25 (Cancel)	August 16, 20...
9	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	12 (Repayment/Informal Forbearance Plan)	August 16, 20...

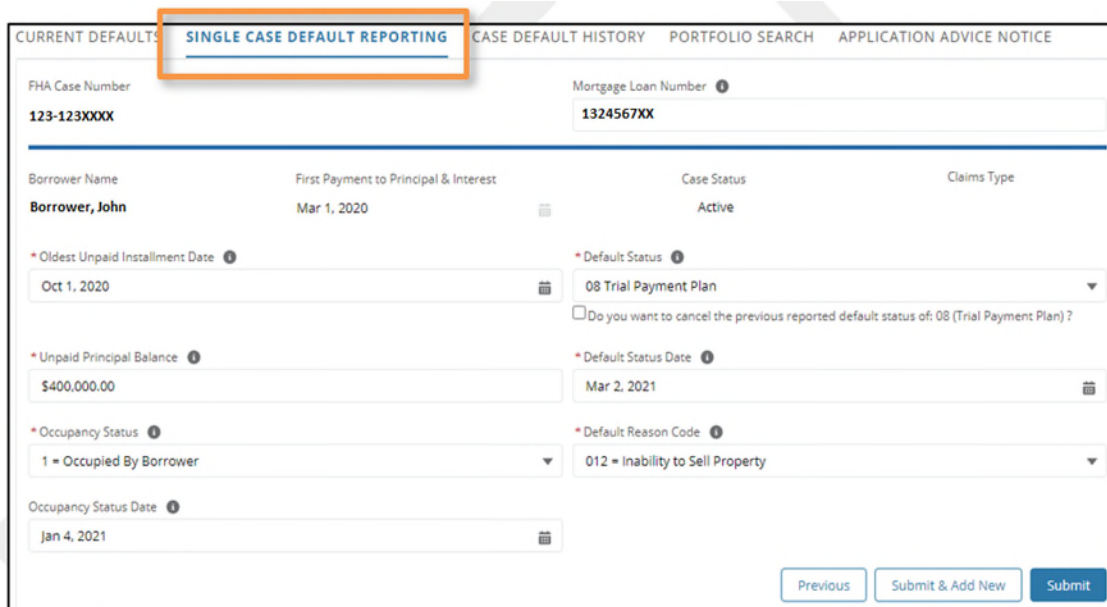
3. To add a New Default Status code, click on the **Add New Default** button at the top of the screen. The **Add New Default** button is a **hyperlink** to the Single Case Default Reporting screen.



The screenshot shows a form with two input fields: 'FHA Case Number' with the value '123-123XXXX' and 'Mortgage Loan Number' with the value '1234567XX'. Below these fields are three buttons: 'Download as CSV', 'Add New Default' (highlighted with an orange box), and 'Finish'.

Figure 25: Case Default History - Add New Default Status

4. The **Single Case Default Reporting** screen displays, and you can now add a new default status on the loan. The procedures to add new statuses are located in [section 5.2](#), to add a single default status, or go to [section 5.3](#) and follow the steps to add multiple default reporting codes.



The screenshot shows the 'SINGLE CASE DEFAULT REPORTING' screen. The 'SINGLE CASE DEFAULT REPORTING' tab is highlighted with an orange box. The form contains the following fields and values:

- FHA Case Number:** 123-123XXXX
- Mortgage Loan Number:** 1324567XX
- Borrower Name:** Borrower, John
- First Payment to Principal & Interest:** Mar 1, 2020
- Case Status:** Active
- Claims Type:**
- \* Oldest Unpaid Installment Date:** Oct 1, 2020
- \* Default Status:** 08 Trial Payment Plan
- \* Unpaid Principal Balance:** \$400,000.00
- \* Default Status Date:** Mar 2, 2021
- \* Occupancy Status:** 1 = Occupied By Borrower
- \* Default Reason Code:** 012 = Inability to Sell Property
- Occupancy Status Date:** Jan 4, 2021

At the bottom right, there are three buttons: 'Previous', 'Submit & Add New', and 'Submit'.



### 6.3.Sort, Filter and Export Case Default History to Excel

The **Case Default History** screen provides a historical view of the reporting history of a case. This screen offers the capability to filter and sort, allowing the history to be exported to an excel spreadsheet when needed. Follow the procedures to export the history to an excel format.

1. Go to the Case Default History Screen. Input the case number in the FHA Case Number field. **Click Next** when completed.

The screenshot shows the 'CASE DEFAULT HISTORY' tab selected. Below the tabs is a search bar labeled 'FHA Case Number' with a red asterisk and an information icon. The number '123-4567890' is entered. To the right of the search bar are two buttons: 'Reset' and 'Next'. A blue arrow points to the 'Next' button.

2. The life of loan Default Reporting Case History displays on the screen. Use the page numbers at the bottom of the screen to page through the data.

The screenshot shows the 'CASE DEFAULT HISTORY' screen with the FHA Case Number '123-123XXXX' and Mortgage Loan Number '1234657XX'. Below the input fields are buttons for 'Download as CSV', 'Add New Default', and 'Finish'. A search bar is present with the text 'Search this list...'. To the right of the search bar is a 'SHOW' dropdown menu set to '10'. Below the search bar is a table with the following columns: Sequence..., Servicer ID, Transaction..., Reporting..., Oldest Unpaid Date, Month Delinq..., Default Status..., and Default Statu... (truncated). The table contains five rows of data. Below the table is a pagination control showing page 1 of 2.

Sequence...	Servicer ID	Transactio...	Transactio...	Reporting ...	Oldest Unpaid Date	Month Delinq...	Default Status ...	Default Statu...
4	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	34 (Natural Disaster)	August 16, 20...
5	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	28 (Modification started)	August 16, 20...
6	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	12 (Repayment/Informal Forbearance Plan)	August 16, 20...
7	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	28 (Modification started)	August 16, 20...
8	123XX	S	August 16, ...	August 31, ...	May 01, 2021	3	25 (Cancel)	August 16, 20...

- Review the **column headings** and use the **dropdowns and arrows** to sort the data. Use your cursor to hover over the column headings to view the **sorting arrows**. Use the **scroll bar** at the bottom of the page to view more columns.

Search this list... SHOW 10 ENTRIES

Sequence...	Servicer ID	Transactio...	Transactio...	Reporting ...	Oldest Unpaid Date	Month Delinq...	Default Status ...	Default Statu...	Unpi...
10	123XX	5	March 23, 2...	March 31, 2...	October 01, 2020	5	08 (Trial Payment Plan)	March 02, 2021	

- Once the on-screen data is in the order you prefer, click on the **Download as CSV** button.

Download as CSV Add New Default Finish

Figure 26: Exporting/Download as CSV

- When using Chrome, the export will load to the bottom of the screen.

export\_106-23338...csv

Figure 27: Download of History

- Click on the export and the file opens in Excel. **Click Finish** to exit the screen and go back to the Case Default History home screen.

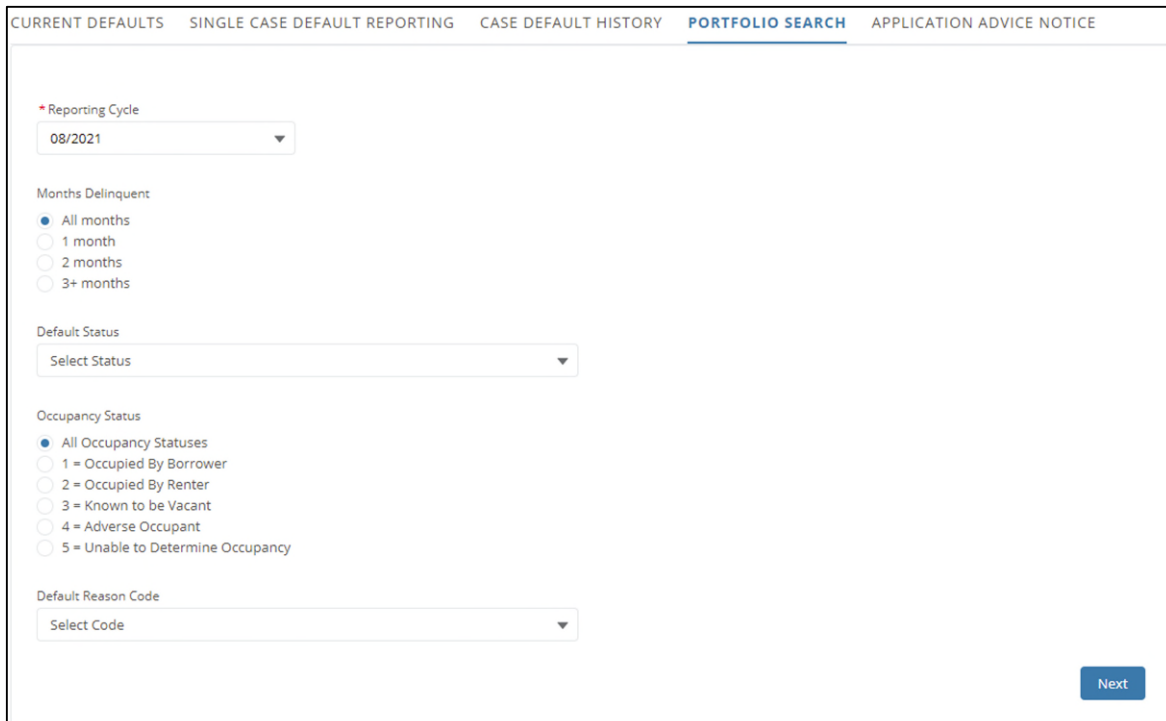
FHA Case	Mortgage	Case Stat	Sequence	Servicer ID	Transactio	Transactio	Reporting	Oldest Un	Month De	Default St	Default St	Unpaid Pr	First Payrr	Reason fo	Occupanc	Occupancy	Date
123-1324XXXX	A	1	123XX	5	*****	*****	*****	5 42	(Delinc	*****	400000	3/1/2020	010	(Neigl	1	(Occupi	*****
123-1324XXXX	A	2	123XX	5	*****	*****	*****	5 95	(State ?	*****	400000	3/1/2020	010	(Neigl	1	(Occupi	*****
123-1324XXXX	A	3	123XX	5	*****	*****	*****	5 95	(State ?	*****	400000	3/1/2020	011	(Propri	1	(Occupi	*****
123-1324XXXX	A	4	123XX	5	*****	*****	*****	5 96	(Feder	1/4/2021	400000	3/1/2020	012	(Inabi	1	(Occupi	1/4/2021
123-1324XXXX	A	5	123XX	5	*****	*****	*****	5 25	(Cancel	1/4/2021	400000	3/1/2020	012	(Inabi	1	(Occupi	1/4/2021
123-1324XXXX	A	6	123XX	5	*****	*****	*****	5 28	(Modifi	1/4/2021	400000	3/1/2020	012	(Inabi	1	(Occupi	1/4/2021
123-1324XXXX	A	7	123XX	5	*****	*****	*****	5 28	(Modifi	2/3/2021	400000	3/1/2020	012	(Inabi	1	(Occupi	1/4/2021
123-1324XXXX	A	8	123XX	5	*****	*****	*****	5 25	(Cancel	2/3/2021	400000	3/1/2020	012	(Inabi	1	(Occupi	1/4/2021
123-1324XXXX	A	9	123XX	5	*****	*****	*****	5 08	(Trial P	2/3/2021	400000	3/1/2020	012	(Inabi	1	(Occupi	1/4/2021
123-1324XXXX	A	10	123XX	5	*****	*****	*****	5 08	(Trial P	3/2/2021	400000	3/1/2020	012	(Inabi	1	(Occupi	1/4/2021

Download as CSV Add New Default Finish



## 7. Portfolio Search Screen

Use the **Portfolio Search** screen to search your portfolio for a list of cases determined by the values selected in the drop-down options. The Portfolio Search screen displays a list of cases meeting the criteria of the preferred options for default reporting through the UI, EDI, and API (API will be in a future release). The list can be downloaded to excel and used as a report, or you can get detailed information from your search results, online, by clicking on the FHA case number.



The screenshot shows the 'PORTFOLIO SEARCH' tab selected in a navigation bar. Below the navigation bar, there are several filter sections:

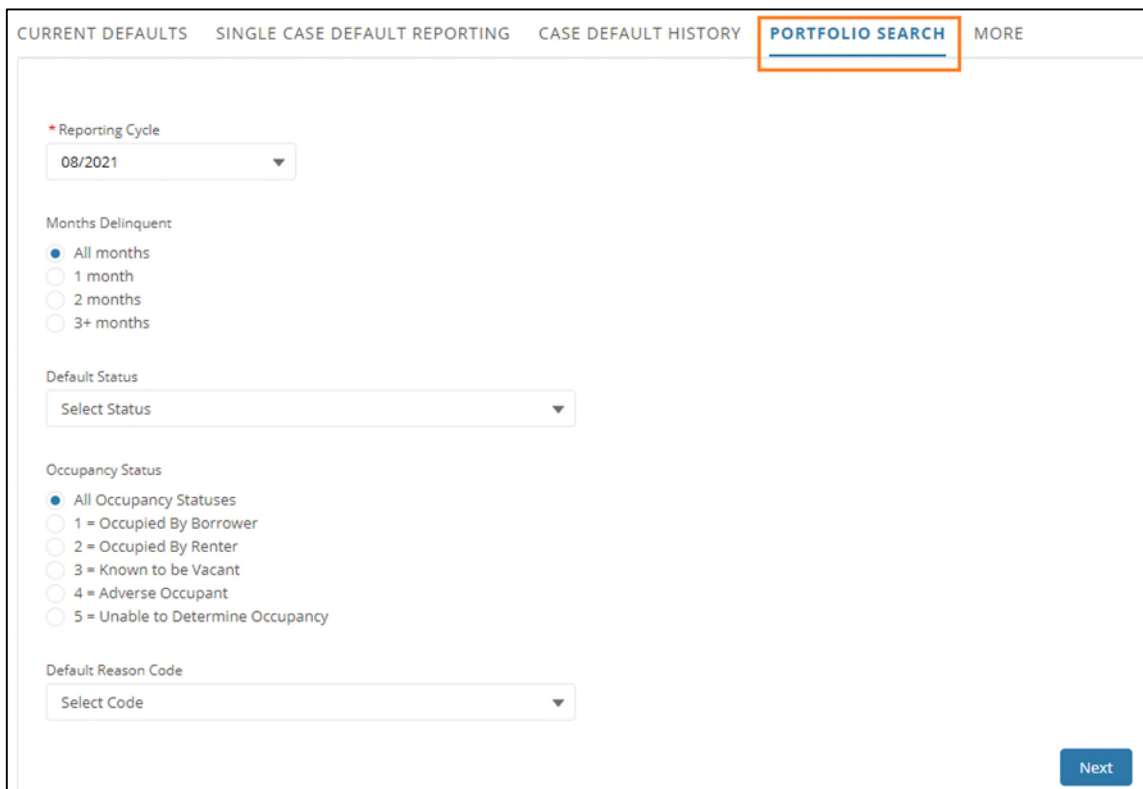
- \* Reporting Cycle:** A dropdown menu showing '08/2021'.
- Months Delinquent:** Radio button options for 'All months' (selected), '1 month', '2 months', and '3+ months'.
- Default Status:** A dropdown menu showing 'Select Status'.
- Occupancy Status:** Radio button options for 'All Occupancy Statuses' (selected), '1 = Occupied By Borrower', '2 = Occupied By Renter', '3 = Known to be Vacant', '4 = Adverse Occupant', and '5 = Unable to Determine Occupancy'.
- Default Reason Code:** A dropdown menu showing 'Select Code'.

A blue 'Next' button is located in the bottom right corner of the form area.

Figure 28: Portfolio Search Screen

## 7.1. How to Search for Loans

1. Click on **Portfolio Search**. A screen displays stating **Portfolio Search** and defaults to the current Reporting Cycle date.
  - The **Servicer ID** field (Required) will determine which Servicer is being searched.
  - The **Reporting Cycle** field (Required) displays date values for the last 12 reporting cycles. Only one month can be selected at a time. Select from the drop-down.



The screenshot shows the 'Portfolio Search' form. At the top, there are tabs: 'CURRENT DEFAULTS', 'SINGLE CASE DEFAULT REPORTING', 'CASE DEFAULT HISTORY', 'PORTFOLIO SEARCH' (highlighted with a red box), and 'MORE'. Below the tabs, the form contains the following fields:

- \* Reporting Cycle**: A dropdown menu with '08/2021' selected.
- Months Delinquent**: A group of radio buttons with options: 'All months' (selected), '1 month', '2 months', and '3+ months'.
- Default Status**: A dropdown menu with 'Select Status' selected.
- Occupancy Status**: A group of radio buttons with options: 'All Occupancy Statuses' (selected), '1 = Occupied By Borrower', '2 = Occupied By Renter', '3 = Known to be Vacant', '4 = Adverse Occupant', and '5 = Unable to Determine Occupancy'.
- Default Reason Code**: A dropdown menu with 'Select Code' selected.

A 'Next' button is located at the bottom right of the form.

2. Go to the **Months Delinquent** field and select one of the buttons. The options available are:
  - None Selected
  - 1 Month
  - 2 Months
  - 3+ Months



CURRENT DEFAULTS SINGLE CASE DEFAULT REPORTING CASE DEFAULT HISTORY **PORTFOLIO SEARCH** MORE

\* Reporting Cycle  
08/2021 ▼

Months Delinquent  
☒ All months  
☐ 1 month  
☐ 2 months  
☐ 3+ months

Default Status  
Select Status ▼

Occupancy Status  
☒ All Occupancy Statuses  
☐ 1 = Occupied By Borrower  
☐ 2 = Occupied By Renter  
☐ 3 = Known to be Vacant  
☐ 4 = Adverse Occupant  
☐ 5 = Unable to Determine Occupancy

Default Reason Code  
Select Code ▼

Next

- Go to the **Default Status** field and select from the drop-down options. You can choose **None selected** to bring in all Default Statuses.

CURRENT DEFAULTS SINGLE CASE DEFAULT REPORTING CASE DEFAULT HISTORY **PORTFOLIO SEARCH** MORE

\* Reporting Cycle  
08/2021 ▼

Months Delinquent  
☒ All months  
☐ 1 month  
☐ 2 months  
☐ 3+ months

Default Status  
Select Status ▼

Occupancy Status  
☒ All Occupancy Statuses  
☐ 1 = Occupied By Borrower  
☐ 2 = Occupied By Renter  
☐ 3 = Known to be Vacant  
☐ 4 = Adverse Occupant  
☐ 5 = Unable to Determine Occupancy

Default Reason Code  
Select Code ▼

Next



4. Go to the **Occupancy Status** field and select one of the buttons. Valid options:

- All Occupancy Status
- 1 = Occupied by Borrower
- 2 = Occupied by Renter
- 3 = Known to be Vacant
- 4 = Adverse Occupant
- 5 = Unable to Determine Occupancy

The screenshot shows the 'PORTFOLIO SEARCH' section of the SFDMS Mortgagee Guide. The 'Reporting Cycle' is set to '08/2021'. The 'Months Delinquent' section has radio buttons for 'All months' (selected), '1 month', '2 months', and '3+ months'. The 'Default Status' dropdown is set to 'Select Status'. The 'Occupancy Status' section is highlighted with an orange box and contains radio buttons for 'All Occupancy Statuses' (selected), '1 = Occupied By Borrower', '2 = Occupied By Renter', '3 = Known to be Vacant', '4 = Adverse Occupant', and '5 = Unable to Determine Occupancy'. The 'Default Reason Code' dropdown is set to 'Select Code'. A 'Next' button is located at the bottom right.

5. Go to the **Default Reason Code** drop-down box and select one of the options. You can choose **None selected** to bring in all Default Reason Code statuses. **Click Next** when completed.

The screenshot shows the 'Default Reason Code' dropdown menu. The text '[None selected]' is displayed in the dropdown box, and a downward arrow is visible on the right side.

6. The **Search criteria** displays the selections made for the search and a list of cases displays at the bottom of the page.

- Click on the **Download as CSV** to export the list to Excel.
- Click on the **FHA case number** to view case history online. Go to **Step 7**.

[CURRENT DEFAULTS](#)
[SINGLE CASE DEFAULT REPORTING](#)
[CASE DEFAULT HISTORY](#)
[PORTFOLIO SEARCH](#)
[APPLICATION ADVICE NOTICE](#)

**Search criteria:**

Servicer ID: 123XX      Cycle Date: 02/2021  
 Months Delinquent: Any      Default Status: Any  
 Reason for Default: Any      Occupancy Status: Any

Current Page: 1  
 Total Pages: 12

[Download as CSV](#)
[Finish](#)

10

Case Number	Months Delinquent	Cycle Date	Loan Number	Case Last Updated	Def Status Code	Def Status Date	Reason for Default
123-1234XXXX	8	February 28...	1234567XX	March 01, 2021	06 (Formal Forbearance Plan)	March 30, 2020	055 (Related to Nation Emergency Declaratic
123-1234XXXX	12	February 28...	1234567XX	March 01, 2021	41 (FHA-HAMP Modification/Partial Claim Started)	February 10, 2...	006 (Curtailment of Income)
123-1234XXXX	6	February 28...	1234567XX	March 01, 2021	37 (FHA-HAMP Stand-alone Modification Started)	January 28, 2021	006 (Curtailment of Income)

Figure 29: Portfolio Search Results Screen

7. If using Chrome, the export will download to the bottom of the screen. Click on the export to view in Excel. **Click Finish** when completed.

Completed

123-1234XXXX	1	April 30, 2021	April 09, 2021	08 (Trial Payment Plan)	April 01, 2020
				06 (Formal Forbearance Plan)	

portfolioSearchExp...csv

B11

fx

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Case Number	Months Delinquent	Cycle Date	Loan Number	Case Last Updated	Def Status Code	Def Status Date	Reason for Default	Occupancy Status	Occupancy Date	Oldest Unpaid Principal	Unpaid Principal	Sequence Number	
2	123-1223XXX	6	6/30/2021		6/15/2021 42 (Delinquent)	1/1/2014 009 (Distant 1)	12/26/2020	123456	3					
3	123-1224XXX	6	6/30/2021		6/15/2021 42 (Delinquent)	1/1/2014 009 (Distant 1)	12/26/2020	123456	2					
4	123-1225XXX	6	6/30/2021		6/9/2021 42 (Delinquent)	1/1/2014 009 (Distant 1)	12/26/2020	123456	1					
5	123-1226XXX	7	6/30/2021		6/15/2021 42 (Delinquent)	1/1/2014 009 (Distant 1)	11/25/2020	123456	4					
6	123-1227XXX	6	6/30/2021		6/15/2021 42 (Delinquent)	1/1/2014 009 (Distant 1)	12/11/2020	123456	3					
7	123-1228XXX	7	6/30/2021		6/15/2021 42 (Delinquent)	1/1/2014 009 (Distant 1)	11/25/2020	123456	2					
8	123-1229XXX	6	6/30/2021		6/15/2021 42 (Delinquent)	1/1/2014 009 (Distant 1)	12/11/2020	123456	1					

Download as CSV

Finish



8. Click on the [Blue Case Number](#) to view the Default Reporting History on the loan selected.

CURRENT DEFAULTS SINGLE CASE DEFAULT REPORTING CASE DEFAULT HISTORY **PORTFOLIO SEARCH** APPLICATION ADVICE NOTICE

Search criteria:

Service ID: Months Delinquent: Any Reason for Default: Any Cycle Date: 06/2021 Default Status: Any Occupancy Status: Any

Current Page: 1  
Total Pages: 1

[Download as CSV](#) [Finish](#)

Search this list... SHOW 10 ENTRIES

Case Number	Months Delinquent	Cycle Date	Loan Number	Case Last Updated	Def Status Code	Def Status Date	Reason for Default
<a href="#">123-1234XXX</a>	6	June 30, 2021		June 15, 2021	42 (Delinquent)	January 01, 2014	009 (Distant Employr Transfer)
<a href="#">123-1235XXX</a>	6	June 30, 2021		June 15, 2021	42 (Delinquent)	January 01, 2014	009 (Distant Employr Transfer)
<a href="#">123-1236XXX</a>	6	June 30, 2021		June 09, 2021	42 (Delinquent)	January 01, 2014	009 (Distant Employr Transfer)

The module displays the **Case Default History** screen for the case number selected. (The case numbers are hyperlinks to the Case Default History screen). Once on the Case Default History screen, you can Download the History, or you can Add New Default Reporting Statuses, if needed. See [Section 6.2](#) to Add New Default Reporting Statuses and [Section 6.3](#) to Download the History.

CURRENT DEFAULTS SINGLE CASE DEFAULT REPORTING **CASE DEFAULT HISTORY** PORTFOLIO SEARCH APPLICATION ADVICE NOTICE

FHA Case Number: 123-1234XXXX Mortgage Loan Number

[Download as CSV](#) [Add New Default](#) [Finish](#)

Search this list... SHOW 10 ENTRIES

Sequence...	Service ID	Transactio...	Transactio...	Reporting ...	Oldest Unpaid Date	Month Delinq...	Default Status ...	Default Statu...	Unpi
1	123XX	S	March 03, 2...	February 28...	December 01, 2020	3	42 (Delinquent)	March 03, 2021	
2	123XX	S	March 04, 2...	February 28...	February 28, 2021	0	42 (Delinquent)	March 03, 2021	
3	123XX	S	March 04, 2...	February 28...	February 28, 2021	0	25 (Cancel)	March 03, 2021	
4	123XX	S	March 04, 2...	February 28...	February 28, 2021	0	67 (Chapter 13 Bankruptcy)	March 03, 2021	
5	123XX	S	March 12, 2...	March 31, 2...	February 28, 2021	0	42 (Delinquent)	March 03, 2021	
6	123XX	S	April 08, 2021	April 30, 2021	February 28, 2021	2	15 (Preforeclosure Acceptance Plan Available)	April 08, 2021	



## 8. Application Advise Notice (AAN) Screen

The AAN screen is used to retrieve detail on (EDI) Electronic Data Interchange default reporting submissions. The Mortgagee is responsible for retrieving results and submitting the necessary corrections by the fifth business day of the month. HUD will not provide additional time to enter corrections. Submissions received after the end of the reporting cycle will be added to the next month's reporting cycle.

### The Error Reports

Use the Reporting Cycle drop down list to view submission dates/times for your organization.

The screenshot displays the CATALYST web application interface. At the top, the CATALYST logo is on the left, and a search bar and user profile (Username) are on the right. Below this is a dark blue navigation bar. Underneath the navigation bar, there are several tabs: 'CURRENT DEFAULTS', 'SINGLE CASE DEFAULT REPORTING', 'CASE DEFAULT HISTORY', 'PORTFOLIO SEARCH', and 'APPLICATION ADVISE NOTICE'. The 'APPLICATION ADVISE NOTICE' tab is currently selected and highlighted. The main content area of the screen shows a 'Reporting Cycle' dropdown menu with the text 'Select Reporting Cycle'. Below the dropdown, it states 'No Submissions exist for selected Reporting Cycle'. A 'Next' button is located at the bottom right of the content area.

## 8.1. How to Retrieve Results

1. Select a Reporting Cycle Date from the drop down list and Click Next.




Figure 30: Application Advice Notice

**Note:** If the Reporting Cycle Date you choose does not have a corresponding default reporting submission, you will see the “No Submissions exist for Selected Reporting Cycle” message, as shown above. Otherwise, the [Next button](#) turns blue for access.

2. Select the **Reporting Cycle** and **Bulk Report Submissions** status and click **Next**.

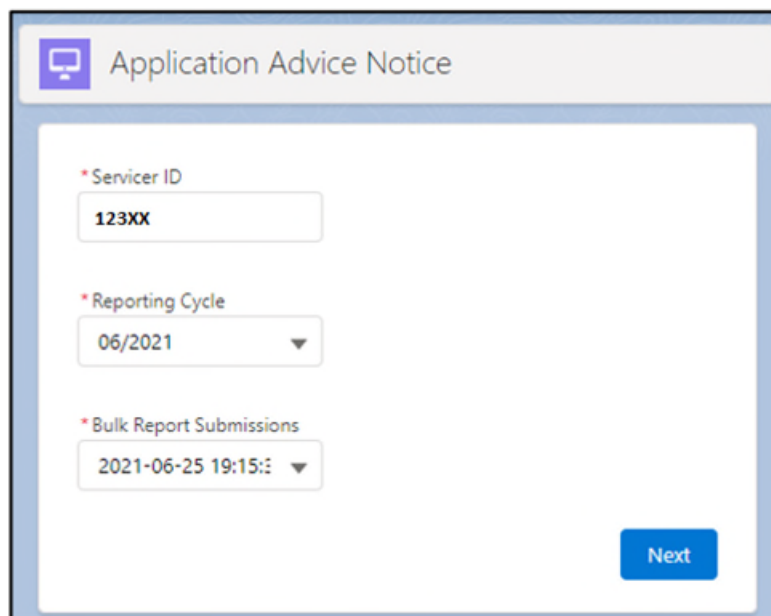


Figure 31: Reporting Cycle and Bulk Report Submission



- The search results display all cases that match your search criteria. Results can be saved by clicking **Download as CSV**. For additional searching and viewing, use the Search box and scroll bar. Once you've finished reviewing, click **Finish** to end your searching.

**Search criteria:**

Servicer ID: 123XX      Cycle Date: 06/2021

Current Page: 1      ☒ Errors Only  
☐ All Transactions  
☐ Successful Transmissions

Total Pages: 3

Download as CSV
Finish

SHOW 5 ENTRIES

Case Number	Sequence Number	Error Codes	Loan Number	Current Def Status Code	New Def Status Code	Accepted	Processed Date
555-1234552	1	R12	1234567890	42	42	true	May 04, 2021
555-1234555	1	R6	1234567890	42	42	true	May 04, 2021
555-1234556	1	R2	1234567890	42	42	true	May 04, 2021
555-1234562	1	R3,R13	1234567890	42	42	true	May 04, 2021
555-1234562	1	R3	1234567890	42	42	true	May 04, 2021

1 OF TOTAL 3 PAGES

< 1 2 3 >

Figure 32: AAN Search Results - Download as CSV, Navigation Bar, and Finish button